

**FOR IMMEDIATE RELEASE****IFPHK Achieves Major Breakthrough in Advancing Retirement Planning Profession  
QRA Qualification Officially Included in  
Macau's Continuing Education Development Programme**

(Hong Kong/Macau, March 26, 2026) The Institute of Financial Planners of Hong Kong (IFPHK) has been dedicated to advancing the retirement planning profession. Following active advocacy by the IFPHK and relevant educational institutions to the Macau SAR Government, the Qualified Retirement Adviser (QRA) education program has been officially included in the Continuing Education Development Program of the Macau Education and Youth Development Bureau starting from 2026. Eligible individuals who successfully complete the QRA education program may receive a subsidy of up to MOP 6,000. In addition, several banks in Macau have incorporated the QRA qualification into their employee training sponsorship schemes, further affirming the market value of this professional qualification. This milestone achievement signifies that IFPHK's efforts in promoting cross jurisdictional professional certification and enhancing the competence of retirement planning practitioners have received wide recognition from both the authorities and the industry.

Individuals who successfully obtain the QRA qualification awarded by IFPHK are eligible for a training subsidy of MOP 6,000. In addition, several banks in Macau have incorporated the QRA into their employee training sponsorship schemes, further affirming the market value of this professional qualification. This milestone achievement signifies that IFPHK's efforts in promoting cross jurisdictional professional certification and enhancing the competence of retirement planning practitioners have received wide recognition from both the authorities and the industry.

To celebrate the 10th anniversary of the QRA qualification and to recognize the outstanding contributions of industry leaders, IFPHK held the "IFPHK Commendation Award Ceremony for 10-year QRA Holders and Best Supporting Organizations for QRA" on 25 March 2026. Over a hundred senior QRA holders and representatives from financial institutions gathered to witness this significant occasion. During the ceremony, IFPHK presented awards to professionals who have held the QRA qualification for ten years, as well as to the three financial institutions with the highest number of QRA holders, Manulife<sup>1</sup>, Prudential<sup>2</sup>, and AIA<sup>3</sup>, in appreciation of their long-standing support for the IFPHK and the development of the retirement planning profession.

Dr. Paris Yeung, Chief Executive Officer of IFPHK, paid tribute to the 10-year QRA holders in his speech and shared IFPHK's latest developments. He remarked, "Ten years ago, we foresaw the pressing need for retirement planning expertise in society and established the QRA qualification. Today, the QRA has not only become a key credential for retirement planning professionals in Hong Kong but has also successfully expanded into the Macau market, gaining official subsidy recognition. This breakthrough demonstrates the high professional standard and practical value of the QRA, and reflects IFPHK's continued contributions to promoting professionalism in the industry. The value of a professional qualification lies not only

---

<sup>1</sup> "Manulife" in the body text refers to Manulife (International) Limited

<sup>2</sup> "Prudential" in the body text refers to Prudential Hong Kong Limited

<sup>3</sup> "AIA" in the body text refers to AIA International Limited

in the transfer of knowledge, but also in equipping practitioners to provide clients with professional advice and services that meet real world needs.”

As of the end of 2025, the total number of QRA holders reached 1,088, with the largest numbers working at Manulife, Prudential and AIA. This fully reflects the high recognition and support of the QRA qualification by leading insurance organizations. Dr. Yeung noted that the three Best Supporting Organizations have over the years actively encouraged their employees to obtain the QRA qualification, continuously investing in professional training and talent development, and contributing significantly to advancing retirement planning and raising the overall professional standards of the industry.

The award presentation session was the highlight of the evening. Representatives from the three “Best Supporting Organizations” - Manulife, Prudential and AIA - each took the stage one by one to receive trophies from Dr. Yeung amidst warm applause, demonstrating their commitment to professional development. Following that, a group of 10-year QRA holders and newly appointed QRA holders came on stage to receive their certificates, in a warm and dignified atmosphere, as guests witnessed the important moments of their professional growth.

In response to the ageing population trend in Hong Kong and globally, as well as the growing demand for wealth accumulation and retirement planning, IFPHK has launched “QRA 2.0”, which features enhanced curriculum content and has successfully expanded the professional certification to the Macau financial market. IFPHK will continue to drive cross jurisdictional and cross sector professional development, striving to elevate the professional competence of financial practitioners and make greater contributions to the industry and society.

**Photo Caption**

	<p><b>Photos 1:</b> Representative of Manulife (International) Limited, Ms. Mandy Yip, Head of Agency Training and Development receives the Best Supporting Organizations award from Dr. Paris Yeung, Chief Executive Officer of IFPHK.</p>
	<p><b>Photos 1:</b> Representative of Prudential Hong Kong Limited, Ms. Esther Lai, Senior Manager of Agency Growth - Business Development, receives the Best Supporting Organizations award from Dr. Paris Yeung, Chief Executive Officer of IFPHK.</p>



**Photos 1:**  
Representative of AIA International Limited, Mr. Raymond So, Associate Director of Business Training and Development, receives the Best Supporting Organizations award from Dr. Paris Yeung, Chief Executive Officer of IFPHK.



**Photo 4:**  
Mr. Alvin Lam, a 10-year QRA holder and CFP certificant, receives recognition at the ceremony.



**Photo 5:**  
Guests and participants at the award presentation ceremony.



香港財務策劃師學會  
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

### **About IFPHK**

IFPHK was established in June 2000 as a non-profit organization for the fast-growing financial industry. It aims to be recognized in the region as the premier professional body representing financial planners that uphold the highest standards to benefit the public.

The Institute is the sole licensing body in Hong Kong authorized by Financial Planning Standards Board Limited to grant the much-coveted and internationally-recognized CFP® certification and AFP® certification to qualified financial planning professionals in Hong Kong and Macau.

Currently there are more than 230,000 CFP certificants in 28 regions; the majority of these professionals are in the U.S., China, Japan, Canada and Brazil. As at 31 December 2025, Hong Kong had approximately 3,465 CFP certificants.

At present, IFPHK has 5,863 members in Hong Kong including 1,088 Qualified Retirement Adviser (QRA) holders; and represents financial planning practitioners in diverse professional backgrounds such as banking, insurance, independent financial advisory, stock broking, accounting, and legal services.

### **For Media Enquiries**

Ms. Agnes Lee

Tel: (852) 2982 7875

Email: [agneslee@ifphk.org](mailto:agneslee@ifphk.org)

Ms. Cally Wong

Tel: (852) 2982 7863

Email: [callistawong@ifphk.org](mailto:callistawong@ifphk.org)